

**Acquisition Reform Focus Groups**  
**Oral Presentations (Categorizer)**  
**February 20-21, 1997**

**Applicability**

1. Applies to Negotiated procurements primarily.

May apply to a two-step sealed bid.

May also apply to sole source procurements.

2. Applicable to contracts for which award is [predicated on some degree on an assessment of an offerors capability to perform from a technical and management standpoint (best value.)

Applies regardless of evaluation technique

Don't limit to only Best Value procurements. They have a place in a Tech Acceptable/Low Offeror setting.

Why? What purpose is served by having oral presentations in a go/no go decision?

3. The nature of the information desired for the evaluation is an important determinate in using oral presentations.

4. Helpful to shorten the time it takes to clarify complex, technical proposals

5. Identify the material that is or should be required in writing.

6. Is the Government prepared to commit resources to conduct and evaluate oral presentations.

7. Must clearly define oral presentation vs. other oral communication (i.e. oral technical proposals, oral discussions.)

The oral technical PROPOSAL must be accompanied by written REPS AND CERTS WITH PRICING.

8. Consider industry input on applicability of oral presentations where possible. Is the expected universe of offerors capable of effectively presenting an oral presentation?

9. Complements Part 12 preference for not requesting written technical proposals and award without discussions.

10. \*As part of training module include a bullet checklist as to what Review Teams will look for when reviewing ORAL proposal- type awards?

This is a policy issue, not a training issue.

11. Does the tech evaluators have the skills and motivation to conduct evaluations  
Training and team building

Don't try it without good people and adequate training.

12. You must include oral presentation technique in your source selection plan.

13. Presumably Lowers B&P cost, which helps small firms compete. Lowers barriers to market entry. Contact improves trust with industry.

14. Works well with performance specs/functional specs, as opposed to detailed equipment specs

Should not eliminate the possibility of using oral presentations to understand an offeror's ability to meet detailed equipment specs.

### **Solicitation**

1. The solicitation should contain the groundrules for the oral presentation as detailed in comments field.

The solicitation should contain the groundrules for the oral presentation which may include: the specific topics to be covered; estimated time when oral presentations will be conducted; time limits on the length of the presentation; limits on the number or content of charts; who should give the presentation; whether any presentation material must be submitted in hard copy format and the date required for this submittal.

Establishing the order of how the topics are going to be presented

Instructions discouraging overly elaborate presentations (keep it simple, not too many charts, presentation evaluations will not be based on personal appearance, only on content)

Solicitation needs to address how the order of presentation of offers will be decided

2. The solicitation should state what means the government will use to document the oral presentation, if any.

3. \*Whether the oral presentations will be binding, and if so, how they can be modified.

WHY WOULD YOU WANT ORAL PRESENTATIONS TO BE BINDING?  
IF THE INTENT IS TO BIND THE OFFEROR, THEN IT SHOULD BE  
OBTAINED IN WRITING.

4. \*Statement which clarifies what constitutes "discussions" and how oral presentations fit into that situation

\*One way to look at this is to assume that the initial comp range includes everyone. Hold "discussions" with everyone, then narrow.

\*Ensure questions and answers after oral presentations are not considered discussions.

5. Will access to the presentation site be allowed in advanced?

6. Solicitation proposal period remains the same (min 30 days).

7. Provide a sanity check by an unbiased party on Section L of the solicitation:  
Instructions

8. Consider having the offeror orally walk you through their cost proposal for analysis and realism purposes.

This should be kept separate since the contractor's technical personnel are not necessarily the preparers of the cost proposal. In addition, Govt technical personnel may not have the ability to evaluate this information.

9. How the oral presentation will be used must be identified in section M. If it is scored the evaluation factors must be stated in section M.

10. Entire evaluation team should be involved in formulation of criteria.  
Absolutely!!!

### **Preliminary Matters**

1. Location: Size of the room; The number of people and equipment;  
Reserve and confirm logistic aspects

Offsite and onsite

2. Scheduling of participants

3. Describe the facility to the vendors (offerors)

4. Consider allowing/presenting via satellite, video tape, teleconference. (pros and cons)

5. Resources: People and materials

6. Consider Providing the opportunity to preview facilities and practice with the equipment.

7. Prepare evaluators for oral presentations.

Stress that evaluators' questions should be clarifying, not argumentative.  
Stay awake!

8. \*Videotape - method of documentation

9. Consider Preliminary Downselect to limit the number of oral presentation?  
How is downselection accomplished in an oral presentation situation prior to est. competitive range? If part of the written proposal is missing or incomplete, maybe downselection is OK. Downselection is OK, but NOT preselection/prequalification.

10. The best trainers are people who have done it before.

11. Training for all personnel is very important. We need to establish ground rules on how to conduct the presentation and evaluation.

That's the purpose of this workshop!

12. Ensure the technical team is knowledgeable of evaluation standards and criteria. Shouldn't be on team if they are not. This should be addressed early in the process.

## **Presentation**

1. Who should and how to determine time limits?

CO in conjunction with technical office.

Complexity of procurement, dollar value, type of contract and content of information.

## 2. Attendees?

Who should attend on both sides (e.g., CO, technical team, project officer, contractor personnel (key), source selection official, etc.)

State whether you want proposed key personnel to present.

Limit the number of speakers and observers.

Offerors need to state who are speakers and who are observers.

## 3. Environment?

Type of facility: size, location, number of rooms, whose facility (e.g., contractor or government or independent site)

Equipment: type of equipment (videotape, overhead projector, computer, audio recorder, etc.)

Support personnel: audio/video experts, etc.

Availability of facility to contractor prior to presentation.

If videotaped, will the offerors be allowed to arrange room?

Lighting, special furniture needs, other logistical considerations (demonstration, handicapped needs)

## 4. Limitation of presentation materials?

## 5. At what stage in the procurement process should presentations be scheduled?

Before or after competitive range is determined.

If before, how many days after submission of written proposals?

If after, how many days after comp range determination?

Should a contractor be able to reschedule the date of their oral presentation if so under what conditions.

## 6. Scheduling?

How many do you schedule in one day?

Length of presentation, offeror set-up time, time required for technical personnel to evaluate previous presentation, etc.

## 7. Instructions to offerors and technical personnel prior to beginning the presentation.

Caution to technical personnel about technical transfusion/leveling.

Caution to offerors regarding time limit, whether offerors will be allowed to ask questions, whether technical personnel will be allowed to ask questions, etc.

8. Major culture change for evaluators; you will need very good people in charge, who can react quickly and appropriately to issues.

9. \*You have to deal with the "fear of failure" on the part of evaluators. What is the culture? Does it tolerate mistakes?

Establish guidelines for questions and for clarifications.

10. Format?

Whether questions and answers?

Whether clarifications or discussions?

Whether questions will be issued in advance to the offerors?

Whether all offerors will get the same questions or specific to written material, etc.

11. avoid marketing,...how?

If the offeror fails to understand the purpose of the oral presentation, then obviously they will not be scored very highly.

12. Consider using a "Pop Quiz". During the presentation ask the offeror to address an unrehearsed question.

Actually, this pop quiz should occur AFTER the offeror has completed their oral presentation. Should be standardized for all offerors.

13. Evaluators should caucus and develop questions with contracting office guidance.

14. How do you conduct questions and answers after oral presentations?

15. Should you allow offerors to caucus for answers to questions?

Most efforts are team-oriented; therefore, the key personnel should be able to caucus for answers to questions.

16. Should you allow offerors to contact outside sources or to use notes to answer evaluators' questions?

Maybe, if it's a pop quiz.

## **Evaluation**

### **1. Voting evaluators only.**

Should the SSA and SSAC attend?

Exclude/include legal?

Nothing wrong with including Source Selection Authority. Source Selection Authority Council may be too cumbersome. Definitely DO NOT include legal.

legal is ok

Whoever attends any one should attend them all.

### **2. Size and make-up of the evaluation team.**

Membership kept to a minimum.

Evaluators must have expertise in the area being evaluated.

### **3. Evaluators must attend all presentations.**

If unavoidable absence occurs for one presentation, then evaluators may review videotape independently (assuming a videotape was made).

Evaluators only need to attend during their specific area of evaluation (i.e., sample task 2, or quality assurance)?

If not disruptive

### **4. Evaluations done independently, then a consensus formed.**

This comment implies that individual scoring will occur. Not necessarily.

### **5. Evaluators use a pre-prepared evaluation sheet which solicits detailed narrative/comments.**

If there are standards they should be included on the pre-printed form.

### **6. Protection of the videotape. When and where viewed.**

### **7. Evaluators must attend all presentations.**

If unavoidable absence occurs for one presentation, then evaluators may review videotape independently (assuming a videotape was made).

Evaluators only need to attend during their specific area of evaluation (i.e., sample task 2, or quality assurance)?

8. Do you evaluate written material not orally presented?

If it's not on the chart but it is orally presented is it evaluated?

Do you evaluate materials not orally presented (when time runs out)

can new material be introduced during the oral presentation.

Do you want your evaluation team to have written copies of oral presentation.

9. How do you treat material which is not in compliance with the RFP limitations (i.e. font size, # of bullets per page)?

If it doesn't comply, scoring should be impacted.

Do you even allow presentation of this material?

10. Influence of presentation styles and personalities upon evaluators?

The training for The evaluation team should address that this is not a factor in the evaluation.

11. When should the evaluators do their write-ups, after the presentation or the next day?

Award

1. Consider in source selection plan how you will deal with orally presented information contractually.

Any oral presentations that you want to contract for should be in writing and writing must match oral presentation. Should have additional "sub factor" document that addresses new innovation presented at oral presentation in writing.

2. \*Implications for debriefing

3. FOIA Releasability of oral presentation information

Technical proposals are now exempt from release under FOIA (unless incorporated into the contract).

4. \*Protest implications of evaluation of oral material

**Scenario**

1. Questions from Evaluators bordering on discussions!

Players: Offeror, Contracting Officer and Specialist, Sample Task Technical Evaluation team.

Environment/Circumstances: Oral presentation of technical proposal prior to competitive range or discussions. The offeror had presented their response to a sample task. The evaluators then took a break to development questions which were then approved by the contracting officer.

The offeror returned to answer questions concerning that particular task. A specific evaluator asked his approved question. The offeror answered the question to the best of his ability, but the evaluator wanted more clarification. The evaluator asked several more pertinent, almost leading, questions on the same area.

Case question: The contracting officer could sense that the evaluator was trying to get the offeror some place where he was not. This verged on discussions as the offeror was almost about to change and revise his proposal. The CO had to call a time-out and ask the evaluator if the offeror's answer was incorrect, and was the evaluator trying to get the offeror "there". The CO had to decide to end the questioning.

## 2. Oral presentation at contractor's facility

When issuing the solicitation, appropriate details and instructions were not provided regarding the oral presentation held at the contractor's facility.

When the government team arrived at the contractor's facility, they found a buffet in the presentation room. They were told that it was for them and they should partake freely. When the government team asked about paying, they were told not to worry about it. Most avoided eating any of the food.

In beginning their oral presentation, the contractor showed a twenty minute marketing video. They then proceeded to have every key personnel talk about their experience and how long they had been employed by the contractor. Since this was an ID/IQ support services contract, there were twenty designated key personnel. They ended the presentation with the president of the company offering a tour of their facility before dinner.

The government team was uncertain how to evaluate and score the presentation since most of the evaluation criteria was not addressed.